

Granting Tax Professional Access to a myVTax Account

One of the many convenient features of myVTax is the ability to give a third party, such as your tax professional, access to your tax account. Levels of access range from “View only” to allowing the third party to “View, File & Pay” your taxes. Before you begin, the third party must create an account in myVTax. Once registered, this person is recognized as an “Existing Third Party” with a username in myVTax. You must obtain the username to grant add the third-party access to your account.

Step 1 Log into your **myVTax** account. From the home screen, click the **I Want To** tab, **1** then **Manage Third Party Access**. **2**

BUSINESS 123
 ***0000
 133 STATE ST
 MONTPELIER VT 05602-2719

Welcome, Test
 You last logged in on Tuesday, Oct 6, 2020 11:59:35 AM
 Manage My Profile

Summary Action Center **1** Settings **I Want To**

What are you looking for?

Submissions
 Search for previous submissions.
 > Search Submissions

Messages
 View messages I've received from the agency.
 > Send a Message
 > View Messages

Letters
 View letters I've received from the agency.
 > View Letters

Payments & Returns
 Manage payments and returns for accounts of this customer.
 > Manage Payments & Returns

Names & Addresses
 View or update names and addresses associated to this customer.
 > Manage Names & Addresses

Access
 Manage access of accounts I have access to.
 > Add Another Account
 > **Manage Third Party Access** **2**

Step 2 Click **Add Third Party**.

< BUSINESS 123

Manage Customer Access
 BUSINESS 123
 _*0000

Manage Access

Third Party Logons
 There are no logons.

On future visits, the third party you grant access to in this session will appear here.

Add Third Party

You may authorize your accountant or third party to grant others access to your account. For example, if your accountant is reviewing your account and is called away to a family emergency, they can grant access to another accountant in the firm to review your account instead. This may be a discussion you have with your accountant ahead of time.

Step 3 Verify that the name that appears in the **Username** field is that of your tax professional or third party.

Click **Allow third parties to grant other logins access to my account(s)** **1** to designate others to access your account. (You can always revoke permission if you change your mind later.)

-OR-

Click **Allow only this login to access my account(s)** **2** to allow only the person named above to access your account.

From the **Account Type(s)** used in your business, click in the appropriate **Add Access** box. **3** You may pick more than one if other accounts are listed.

Step 4

Once you have granted the third-party permission to access an account, you then must specify the **Begin/End Tax Years** **1** for that account. The third party will not be able to access a period outside of the range you designate.

Click the **down arrow** **2** to select the **level of access** you wish to grant to your tax professional.

Note: If the third party is registered using a Social Security Number, then the only option available is "View."

When done, click **Submit**. **3**

Preparer access must be updated every five years. The **Access Expiration Date** field will automatically prefill to five years from today. If you prefer that the preparer's access to expire sooner, you may enter any date within the next five years.

